

# SAP Business Intelligence Reporting

## BI Grievance InfoCube

Washington State HRMS Business Intelligence (BI)  
Self-Paced Learning Materials

General Topics - BI Grievance InfoCube End Users/Power Users

The BI Grievance InfoCube section provides an overview of the BI Grievance InfoCube, including basic steps for running the BI Grievance reports and applying user-defined settings to the reports.

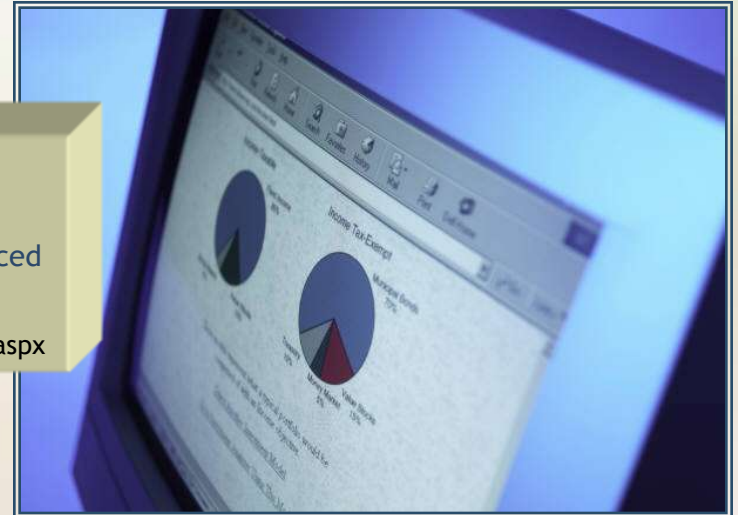
Topics covered in this section include:

- BI Grievance InfoCube Overview
- BI Grievance Reports Overview
- BI Grievance Report Variables
- Defining BI Grievance Report Variables
- User-Defined Settings for BI Grievance Reports
- Using the Goto Command

The BI Grievance InfoCube section is intended for BI Grievance InfoCube End Users and Power Users.

It is recommended BI Grievance End Users and Power Users read all BI Self-Paced Learning Materials prior to reading the BI Grievance InfoCube section:

<http://www.dop.wa.gov/payroll/HRMS/Training/Pages/BusinessIntelligenceTraining.aspx>

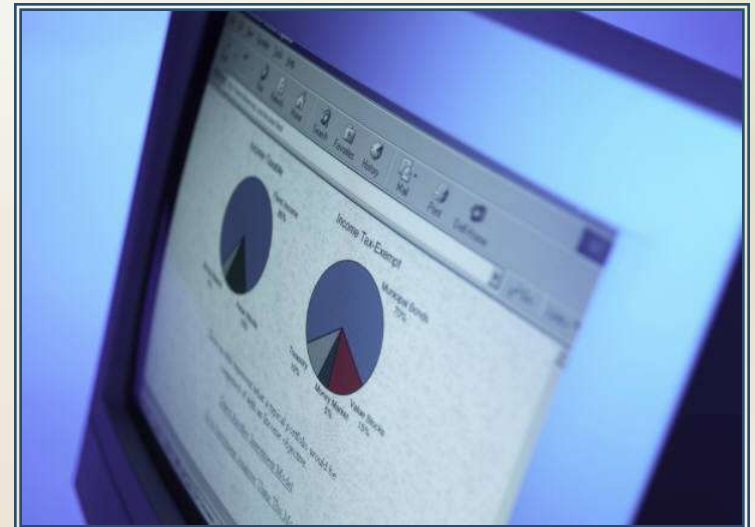


# BI Grievance InfoCube Overview

The BI Grievance InfoCube Overview section provides an overview of the BI Grievance InfoCube.

Topics covered in this section include:

- BI Grievance InfoCube Overview



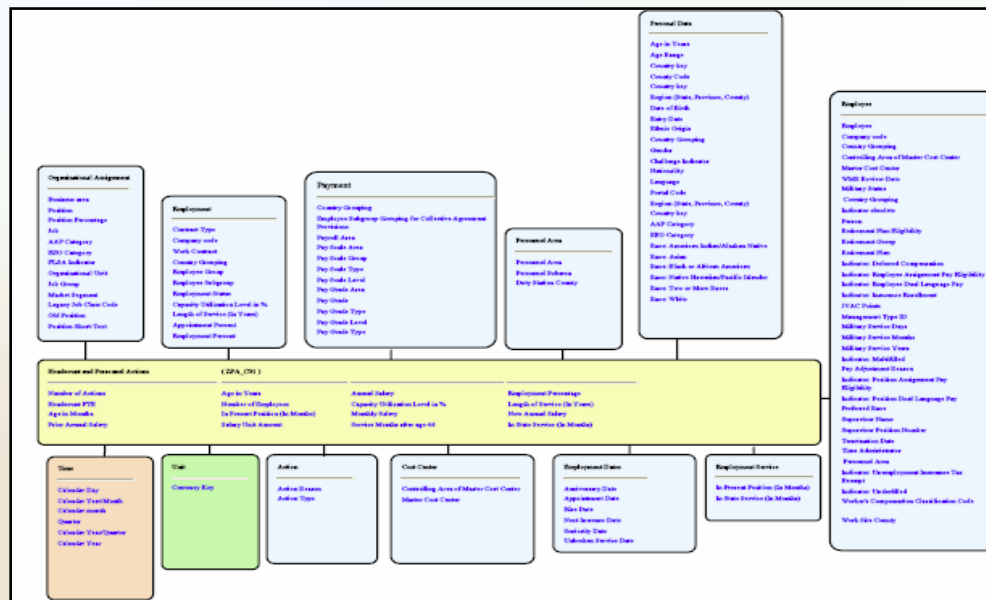
# BI Grievance InfoCube Overview

The BI Grievance InfoCube is populated with data received from HRMS. The BI Grievance InfoCube includes:

- Master Agreement Grievance data.
- Master Agreement, Article/Sub-Article, Grievance Step, Grievance status, and Grievance History.

The diagram below displays the reporting elements included in the Grievance InfoCube (Grievance ZGR\_C01):

Grievance InfoCube (Grievance ZGR\_C01)

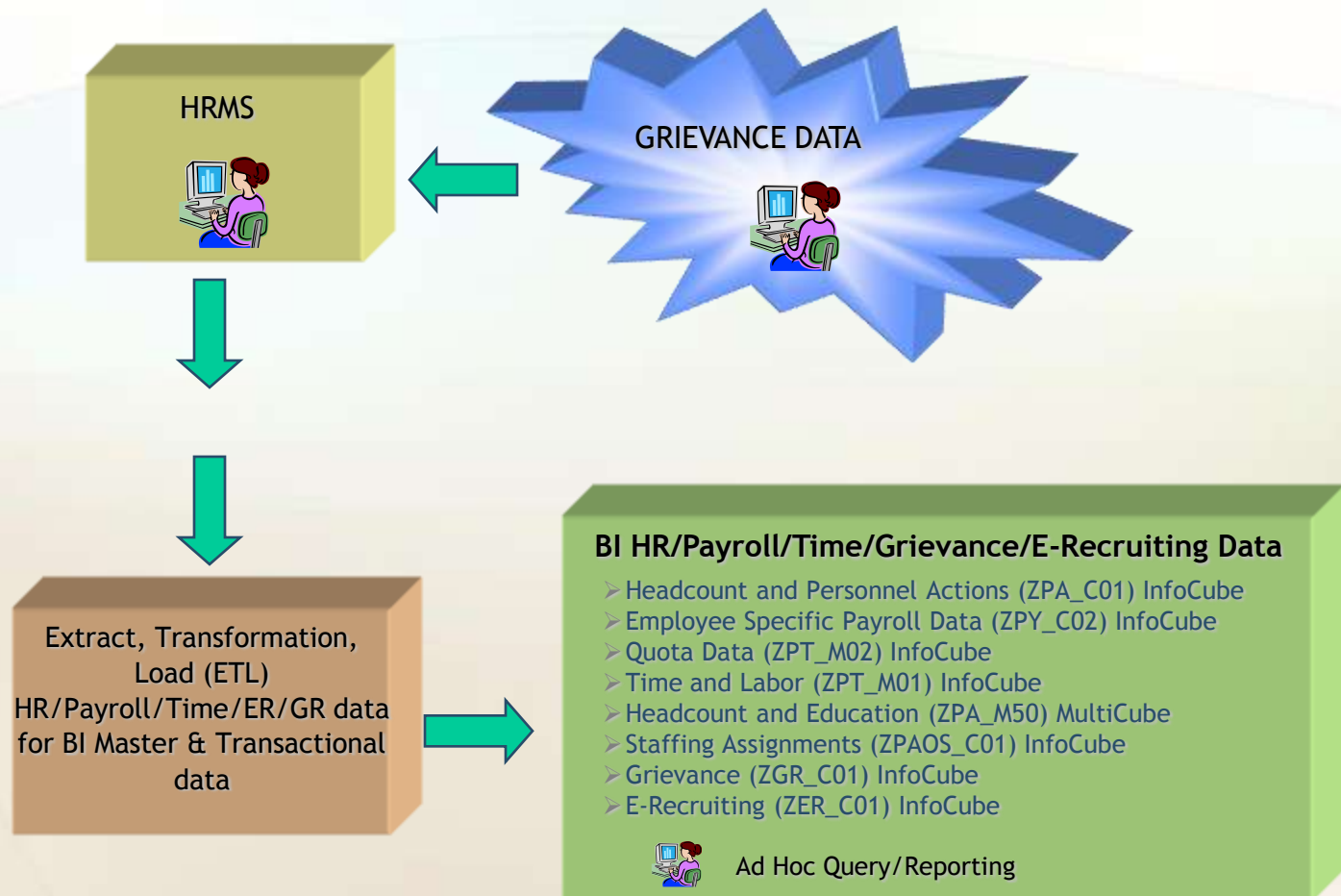


Continued...

# BI Grievance InfoCube Overview, Cont...

The following illustration shows the Extract, Transformation, and Load (ETL) process of data for BI :

- HR/Payroll/Time/Grievance/E-Recruiting Data: loaded directly from HRMS into the BI InfoProviders (InfoCubes and MultiCubes).



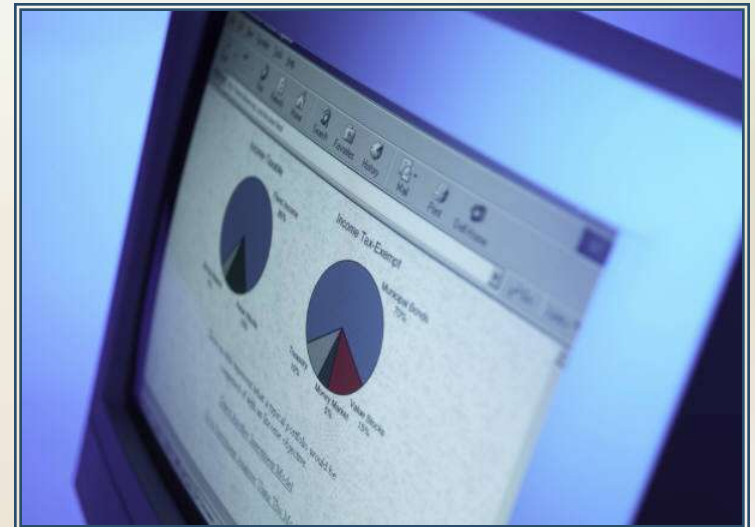


# BI Grievance Reports Overview

The BI Grievance Reports Overview section provides an overview of the BI Grievance Reports.

Topics covered in this section include:

- BI Grievance Reports Overview
- Accessing BI Grievance Reports from the HRMS Portal
- Selecting a BI Grievance Report
- Running a BI Grievance Report



# BI Grievance Reports Overview

BI Grievance reports were designed to provide users with flexible reporting options.

Users will have the ability to set User-Defined settings from the report results. User-Defined Settings allow the user to add or remove Rows or Columns, set Filters, and Sort. These User-Defined Settings can then be saved as a Bookmark in the user's Favorites folder from their web browser. When the Bookmark is run from the Web Browser, the report results will be displayed with all user-defined settings.

The seven BI Grievance Reports included with the BI Grievance InfoCube are:

Report Name	Report Description	Category
<b>Grievance Detail Report</b> ZZGR_M01_Q502	Displays information on current grievances based on selection screen criteria.	Grievances
<b>Grievance Totals by Master Agreement Report</b> ZZGR_M01_Q503	Displays counts on grievances based on selection screen criteria, by Master Agreement.	Grievances
<b>Grievance Totals by Agency Report</b> ZZGR_M01_Q504	Displays counts on grievances based on selection screen criteria, by Agency.	Grievances
<b>Grievance Article Trend Report</b> ZZGR_M01_Q505	Displays details and allows for further analysis of the articles being grieved in the Grievance Process.	Grievances
<b>Grievance Detail Agency Report</b> ZZGR_M01_Q506	Displays details and allows for further analysis of the articles being grieved in the Grievance Process.	Grievances
<b>Grievance History Report</b> ZZGR_M01_Q507	Displays all details related to a specific grievance to include the history of the grievance.	Grievances
<b>Grievance Status Totals Report</b> ZZGR_M01_Q509	Displays output that is a matrix format providing counts of grievances by sub-article, step in the process and status.	Grievances

# Accessing BI Grievance Reports from the HRMS Portal

BI Grievance reports are accessed from the HRMS Portal. Instructions for logging on to the HRMS Portal are included in the BI Self-Paced Learning Materials - Logging on to HRMS Portal section.

## Welcome to Washington State's Human Resource Management Systems

**HRMS PORTAL 7.0**  
  
This is a secure application and available only to Washington State employees.  
  

User ID *	JaneD
Password *	••••••••

Log on

  
[Logon Problems?](#) [Get Support](#)



**HR** Copyright June 2005



For information on logging on to the HRMS Portal, reference the BI Self-Paced Learning Materials from the HRMS Support Website:

<http://www.dop.wa.gov/payroll/HRMS/Training/Pages/BusinessIntelligenceTraining.aspx>

Continued...



# Accessing BI Grievance Reports from the HRMS Portal

The diagram below provides a sample of the screen displayed once the user has logged on to the HRMS Portal:

The diagram illustrates the HRMS Portal interface with the following components and annotations:

- Top Bar:** Welcome Jane Doe, Search, Advanced Search.
- Navigation Tabs:** BI Reports, Organization Management, Personnel Administration, Time Management, Payroll, Financials, HRM Performance Measurement, **Grievance Reporting**, E-Recruiting.
- Left Panel (Position / Personnel Master Listing):**
  - Detailed Navigation:**
    - Position / Personnel Master Listing
    - Position Statistics Report - Month Ending
    - Position Roster
  - Portal Favorites:**
- Right Panel (Variable Entry):**
  - Available Variables: [Dropdown] [Save] [Save As...] [Delete]
  - General Variables Table:**

Variable	Current Selection	Description
* Month/Year Range (Mandatory)		
Organizational Unit Hierarchy		
Job - Multiple (Optional)		
  - [OK] [Check]

**Annotations:**

- Click on "BI Reports" to view categories
- By default, the Organization Management category is selected and the Position-Personnel Master Listing is displayed
- Click on the Grievances category to view the list of BI Grievance reports
- Once the Grievances category is selected, the Detailed Navigation pane will display the list of BI Grievance reports to choose from.
- The Grievance Details Report is displayed by default

**Bottom Panel (Grievance Details Report):**

- Navigation Tabs:** BI Reports, Organization Management, Personnel Administration, Time Management, Payroll, Financials, HRM Performance Measurement, **Grievance Reporting**, E-Recruiting.
- Left Panel (Grievance Details Report):**
  - Detailed Navigation:**
    - Grievance Details Report**
    - Grievance Master Agreement Report
  - Portal Favorites:**
- Right Panel (Variable Entry):**
  - Available Variables: [Dropdown] [Save] [Save As...] [Delete] [Show Variable Personalization](#)
  - General Variables Table:**

Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		

# Selecting a BI Grievance Report

The example below uses the Grievance Details Report to show how to select a report from the HRMS Portal.

To select the Grievance Details Report:

1. Click the Grievances category link.
2. Click the report name link from the Detailed Navigation pane.

Result: A variables selection box will appear to allow the user to enter variables (selection criteria) for the report:

Variable Entry

Available Variables:  Save Save As... Delete [Show Variable Personalization](#)

Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		

Click here to scroll left/right in the Detailed Navigation pane


Click here to show / hide the Detailed Navigation pane

Detailed Navigation

# Running a BI Grievance Report

The example below uses the Grievance Details Report to show how to run a BI Grievance report.

To run a BI Grievance Report:

1. Enter variables.  
 Variables with an asterisk are required fields.

Note: To ensure variables are valid, click the Check button prior to running the report.

2. Click the OK button to run the report.

## Variable Entry

Available Variables:  Save Save As... Delete

[Show Variable Personalization](#)

### General Variables

Variable	Current Selection	Description
* Report Date Range	7/31/2007	
Contract Year		
Orig Agency Code	2250	
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

OK Check

## Grievance Details Report

### Grievance Details Report

Display As  Information Send Print Version Export to Excel Comments

#### Columns

▪ Key Figures

#### Rows

▪ Contract YR1

▪ Master Agreement1

Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area	Orig BU Code
05-07	WFSE	2250 Washington State Patrol	2250 Washington State Patrol	00JN Agencywide

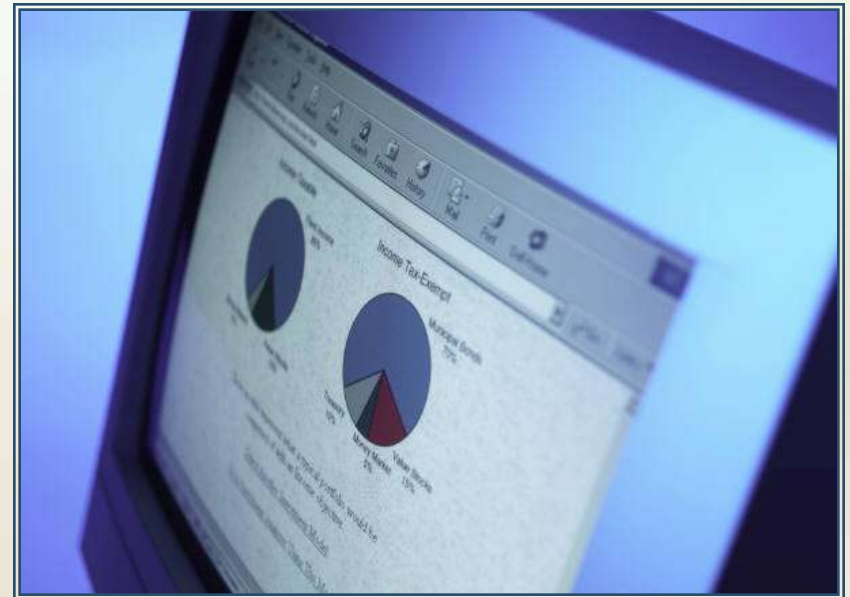
Result: Report results with selected variables.

# BI Grievance Report Variables


The BI Grievance Report Variables section provides an overview of report Variables. Variables are report selection criteria that allow the user to narrow report results to specific values (for example, display results for a specific Agency only).

Topics covered in this section include:

- BI Grievance Report Variables
- Selecting Multiple Variables
- Deleting Variables
- Personalizing Variables
- Deleting Personalized Variables



# BI Grievance Report Variables

Variables are report selection criteria that allow the user to narrow report results to specific values. The user may enter variables manually or click on the matchcode button  to select a variable from a list.

Variables identified with an asterisk are required fields.

### Grievance Details Report

#### Variable Entry

Available Variants:

[Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

The user may manually enter the variable, or click the matchcode button to bring up a list to choose from

Use the "Search" feature to find a specific variable. Enter the variable value and click the "Search" button. Use an asterisk (\*) for wildcard searches.

Select values for Personnel Area (ZV\_OPERS\_AREA 0003)

Show view: Search

Search

Personnel Area: Text

Maximum 1000

OR

Click the desired variable from the list

Matchcode popup list

Personnel Area Key	Personnel Area Text
1030	Dept Comm/Trade/Econ Dev
1070	Health Care Authority
1160	Washington State Lottery
1200	Human Rights Commission
1400	Dept Revenue
1470	Off Use & Women's Empow
1500	General Administration
1550	Dept of Info Services
1600	Insurance Commissioner
1800	Wash Horse Racing Co.
1900	SD of Industrial Appeals

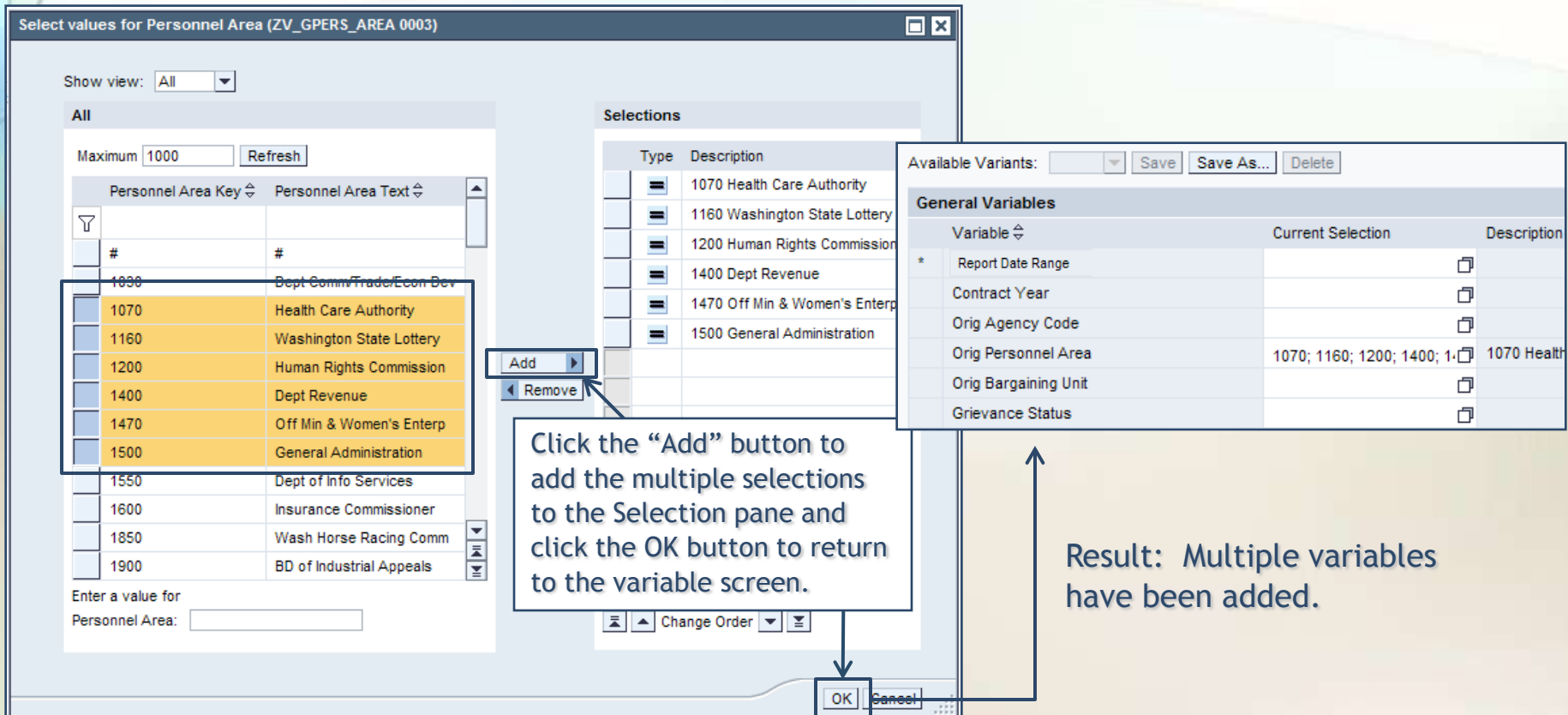


# Selecting Multiple Variables

The example below uses the Grievance Details Report to show how to insert multiple variables of the same type for a report.

To select multiple variables:

1. Click the matchcode  button
2. At the selection screen, select the multiple values, click the “Add” button, and then click OK.



Select values for Personnel Area (ZV\_GPERS\_AREA 0003)

Show view: All

Maximum 1000 Refresh

Personnel Area Key	Personnel Area Text
#	#
1030	Dept Comm/Trade/Econ Dev
1070	Health Care Authority
1160	Washington State Lottery
1200	Human Rights Commission
1400	Dept Revenue
1470	Off Min & Women's Enterp
1500	General Administration
1550	Dept of Info Services
1600	Insurance Commissioner
1850	Wash Horse Racing Comm
1900	BD of Industrial Appeals

Enter a value for Personnel Area:

Selections

Type	Description
	1070 Health Care Authority
	1160 Washington State Lottery
	1200 Human Rights Commission
	1400 Dept Revenue
	1470 Off Min & Women's Enterp
	1500 General Administration

Add Remove

Click the “Add” button to add the multiple selections to the Selection pane and click the OK button to return to the variable screen.

Available Variables: Save Save As... Delete

General Variables		
Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area	1070; 1160; 1200; 1400; 1500	1070 Health
Orig Bargaining Unit		
Grievance Status		

OK Cancel

Result: Multiple variables have been added.

# Deleting Variables

The example below uses the Grievance Details Report to show two ways to delete a variable that was entered in error or to replace the current variable.

To delete a variable:

1. Highlight the text of the Variable and press “Delete” on the keyboard.

General Variables		
Variable ⇅	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area	100; 1200; 1400; 1470; 1500	1070 Health Ca
Orig Bargaining Unit		

Highlight Variable values and press the Delete key on the keyboard

OR

Select values for Personnel Area (ZV\_GPER\_S\_AREA 0003)

Show view: All

Maximum 1000 Refresh

Personnel Area Key ⇅ Personnel Area Text ⇅

Click the matchcode and in the “Select value” box, select the variables, click “Remove” and “OK”

1500 General Administration

Add Remove

Type	Description
1070	Health Care Authority
1160	Washington State Lottery
1200	Human Rights Commission
1400	Dept Revenue
1470	Off Min & Women's Enterp
1500	General Administration

General Variables		
Variable ⇅	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		

Result: Variables have been deleted

# Personalizing Variables

Users have the ability to personalize variables from the HRMS Portal. Personalizing variables allows the user to save the variable setting they have entered.



Personalizing a variable for one report will personalize the same variable for all other reports if that variable is used. For example, in the illustration below the user is personalizing the Grievance Details Report “Orig Personnel Area” variable for the report. Once the Orig Personnel Area variable has been personalized, the same value will be used for Orig Personnel Area for all other custom reports. Once a variable is personalized, it is no longer displayed on the variables screen. See Removing Personalized Variables for information on removing the personalization of a variable.

Available Variables:

Show Variable Personalization

Click here to access the personalize variable options.

General Variables		
Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

Continued...

# Personalizing Variables, cont...

The example below uses the Grievance Details Report to show how to Personalize the Orig Personnel Area Variable.

To Personalize the Orig Personnel Area Variable:

1. Enter the Orig Personnel Area Variable(s).

2. Click the “Select” button for the variable.

3. Select the “Add selected variables to personalized variables list”.

General Variables			
	Variable ⇅	Current Selection	Description
<input type="checkbox"/>	* Report Date Range		
<input type="checkbox"/>	Contract Year		
<input type="checkbox"/>	Orig Agency Code		
<input checked="" type="checkbox"/>	Orig Personnel Area	1110;1111;	
<input type="checkbox"/>	Orig Bargaining Unit		
<input type="checkbox"/>	Grievance Status		
<input type="checkbox"/>	Step		
<input type="checkbox"/>	Master Agreement 1		
<input type="checkbox"/>	Article #1		
<input type="checkbox"/>	Article Name 1		
<input type="checkbox"/>	Addtl Discipline Reason 1		

Personalized Variables			
	Variable ⇅	Current Selection	Description
<input type="checkbox"/>			

☐ Show Personalized Variables

Result: The Orig Personnel Area personalization has been added to the “Personalized Variables” section.

Once the Personnel Area variable is personalized, it will no longer be displayed as a variable option from the Variables input screen.

Click “Show Variable Personalization” to view any variables that are personalized.

Available Variables:  Save Save As... Delete [Hide Variable Personalization](#)

General Variables			
	Variable ⇅	Current Selection	Description
<input checked="" type="checkbox"/>	Report Date Range		
<input type="checkbox"/>	Contract Year		
<input type="checkbox"/>	Orig Agency Code		
<input type="checkbox"/>	Orig Bargaining Unit		
<input type="checkbox"/>	Grievance Status		
<input type="checkbox"/>	Step		
<input type="checkbox"/>	Master Agreement 1		
<input type="checkbox"/>	Article #1		
<input type="checkbox"/>	Article Name 1		
<input type="checkbox"/>	Addtl Discipline Reason 1		

⏮ ⏭ ⏪ ⏩ ⏭ ⏮

Personalized Variables			
	Variable ⇅	Current Selection	Description
<input type="checkbox"/>	Orig Personnel Area	1110; 1111	<input type="checkbox"/> 1110 Dept of Personnel; 1111 Information S

☐ Show Personalized Variables

OK Check

Available Variables:  Save Save As... Delete [Show Variable Personalization](#)

General Variables			
	Variable ⇅	Current Selection	Description
<input checked="" type="checkbox"/>	Report Date Range		
<input type="checkbox"/>	Contract Year		
<input type="checkbox"/>	Orig Agency Code		
<input type="checkbox"/>	Orig Bargaining Unit		



# Deleting Personalized Variables

The example below uses the Grievance Details Report to show how to remove the Personalized Variable for Orig Personnel Area from the Grievance Details Report Variable screen.

To remove the Personalized Variable for Orig Personnel Area:

1. Click the Show Variable Personalization button to display personalized variables.
2. Select the personalized variable you want to remove.
3. Click on the “Remove selected variables from personalize variables list”.

## Variable Entry

Available Variables:  Save Save As... Delete

[Show Variable Personalization](#)

### General Variables

Variable ⇅	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		



### Personalized Variables

Variable ⇅	Current Selection	Description
Orig Personnel Area	1110; 1111	1110 Dept of Personnel; 1111 Information S

☐ Show Personalized Variables

OK Check

Available Variables:  Save Save As... Delete [Hide Variable Personalization](#)

### General Variables

Variable ⇅	Current Selection	Description
* Report Date Range		
Orig Agency Code		
Orig Personnel Area	1110; 1111	1110 Dept of Personnel; 1111 Information S
Orig Bargaining Unit		



### Personalized Variables

Variable ⇅	Current Selection	Description
------------	-------------------	-------------

☐ Show Personalized Variables

OK Check

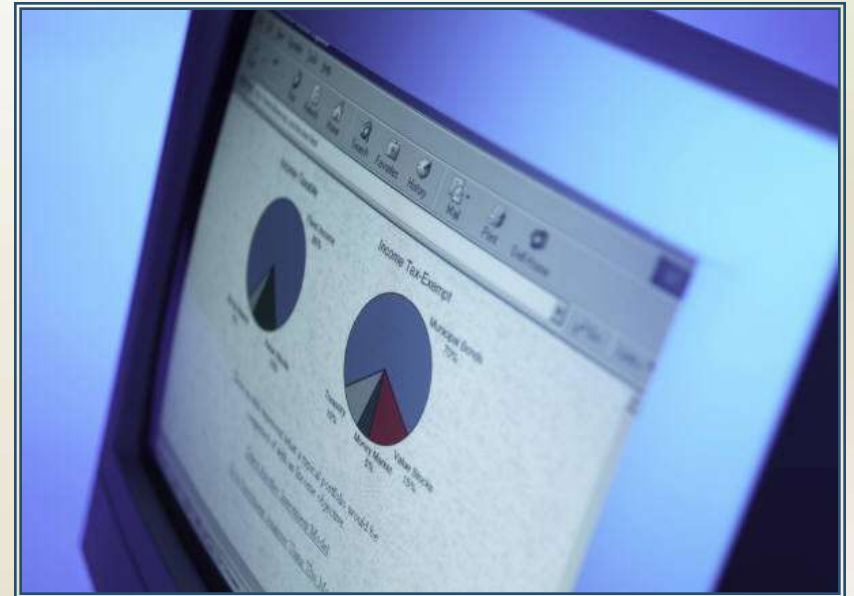
Result: The Orig Personnel Area variable will appear.

# Defining BI Grievance Report Variables

The Defining BI Grievance Report Variables section provides the basic steps for entering variables for BI Grievance reports. BI Grievance reports require variable entry (selection criteria) prior to running the reports.


Topics covered in this section include:

- Defining Variables: Grievance Details Report
- Defining Variables: Grievance Master Agreement Report




## Grievance Details Report

To define the Grievance Details Report variables:

1. Enter a value for selected report variables or use the matchcode  button to access the matchcode list to select the variables.  
*\*Fields with an asterisk are required.*

2. Click the OK button.

Available Variables:  Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Report Date Range	← In this example, "Report Date Range" is a required field	
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

OK Check

Select values for Personnel Area (ZV\_GPENL\_AREA 0003)

Show view: All

Maximum: 1000 Refresh

Personnel Area Key	Personnel Area Text
#	#
1030	Dept Comm/Trade/Econ Dev
1070	Health Care Authority
1160	Washington State Lottery
1200	Human Rights Commission
1400	Dept Revenue
1470	Off Min & Women's Enterp
1500	General Administration
1550	Dept of Info Services
1600	Insurance Commissioner
1850	Wash Horse Racing Comm
1900	BD of Industrial Appeals

Enter a value for Personnel Area:

Sample Matchcode list for Personnel Area


OK Cancel

Result: The Grievance Details Report results are displayed.

# Defining Variables: Grievance Master Agreement Report

## Grievance Master Agreement Report

To define the Grievance Master Agreement Report variables:

1. Enter a value for selected report variables or  the matchcode button to access the matchcode list to select the variables.  
\*Fields with an asterisk are required.
2. Click the OK button.

Result: The Grievance Master Agreement Report results are displayed.

Available Variables:  Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

OK Check

In this example, "Report Date Range" is a required field

Select values for Personnel Area (ZV\_GPENL\_AREA 0003)

Show view: All

Maximum: 1000 Refresh

Personnel Area Key	Personnel Area Text
1030	Dept Comm/Trade/Econ Dev
1070	Health Care Authority
1160	Washington State Lottery
1200	Human Rights Commission
1400	Dept Revenue
1470	Off Min & Women's Enterp
1500	General Administration
1550	Dept of Info Services
1600	Insurance Commissioner
1850	Wash Horse Racing Comm
1900	BD of Industrial Appeals

Enter a value for Personnel Area:

Sample Matchcode list for Personnel Area

OK Cancel



# User-Defined Settings for BI Grievance Reports

The User-Defined Settings for BI Grievance Reports section provides an overview of options available to users once they have run a BI Grievance report from the HRMS Portal.

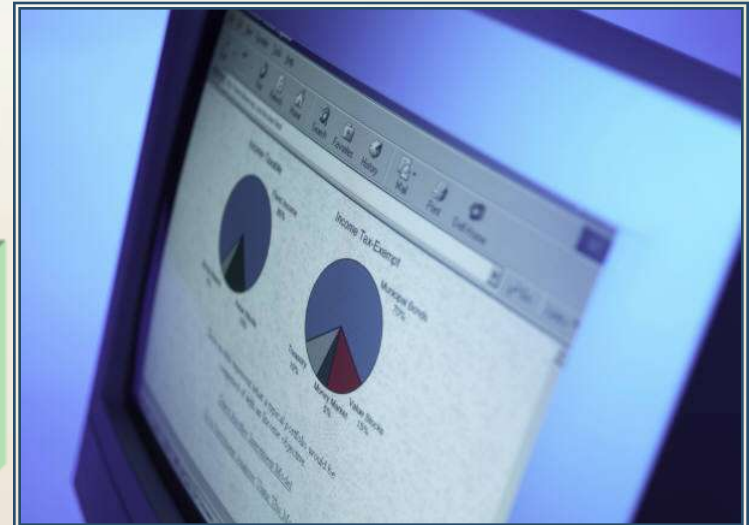
User-Defined Settings allow the user to add or remove Rows or Columns, set Filters, and Sort. These User-Defined Settings can then be saved as a Bookmark in the user's Favorites folder from their web browser. When the Bookmark is run from the Web Browser, the report results will be displayed with all user-defined settings.

Topics covered in this section include:

- Remove Drilldown
- Drilldown in the Rows/Columns
- Free Characteristics
- Keep Filter Value
- Select Filter Value
- Sorting
- Bookmark (saving User-Defined settings)



BI Grievance reports are large and contain many rows and columns. These reports were designed to provide users with flexible reporting options. Users have the ability to add/remove rows or columns, filter report results, sort report results and save their user-defined settings as Bookmarks for future use.






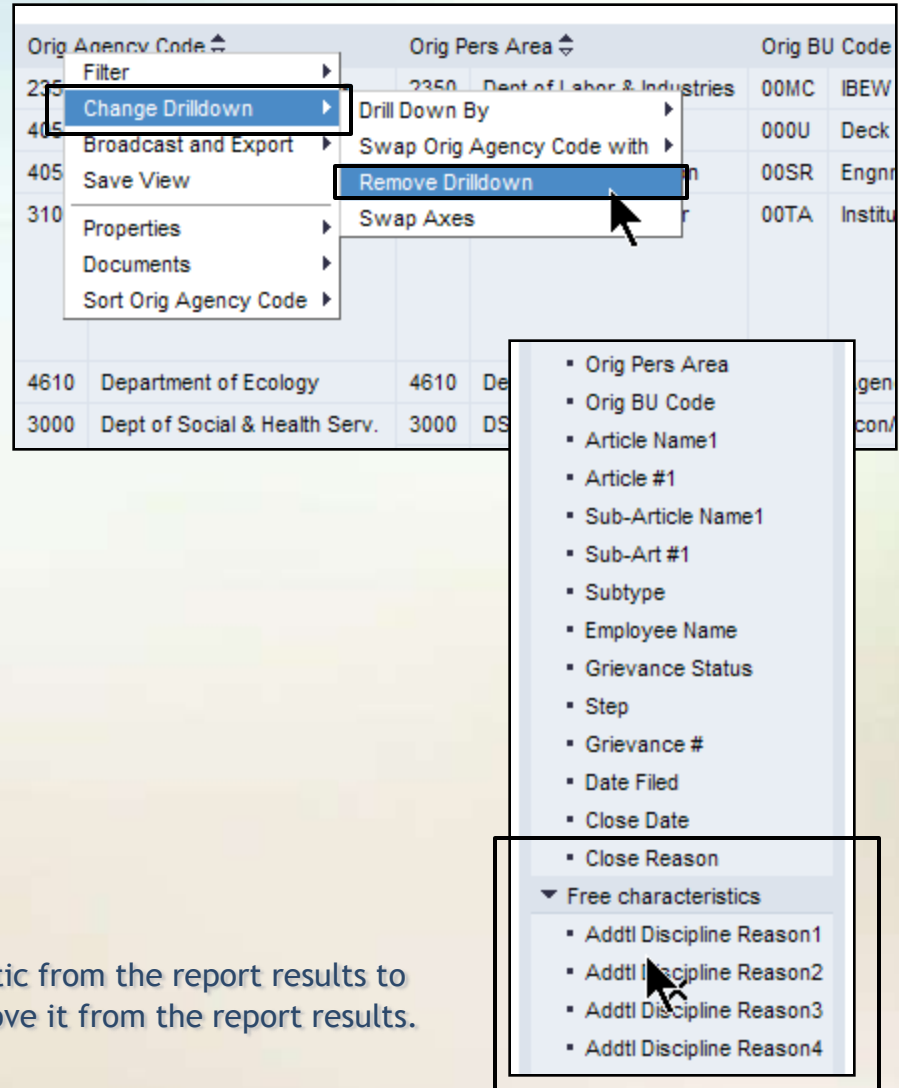
BI Grievance reports were designed to provide the user with flexible reporting options. Initial report results can be large and contain many rows and columns. By using the Remove Drilldown option, users have the ability to remove Characteristics from the rows or columns of the report results.

The example uses the Grievance Details Report to show how to remove the Orig Agency Code Characteristic from the report results.

To remove the Orig Agency Code from the Report Results:

1. Right click on the Orig Agency Code characteristic.
2. Select “Change Drilldown → Remove Drilldown.

 You can also Drag&Drop the characteristic from the report results to the Free Characteristics section to remove it from the report results.



Orig Agency Code	Orig Pers Area	Orig BU Code
235	2350 Dept of Labor & Industries	00MC IBEW
405		000U Deck
405		00SR Engnr
310		00TA Institu
4610	Department of Ecology	4610 De
3000	Dept of Social & Health Serv.	3000 DS

- Orig Pers Area
- Orig BU Code
- Article Name1
- Article #1
- Sub-Article Name1
- Sub-Art #1
- Subtype
- Employee Name
- Grievance Status
- Step
- Grievance #
- Date Filed
- Close Date
- Close Reason
- ▼ Free characteristics
  - Addtl Discipline Reason1
  - Addtl Discipline Reason2
  - Addtl Discipline Reason3
  - Addtl Discipline Reason4

Continued...

Result: The Orig Pers Area Characteristic has been removed from the report results.

Orig Agency Code ↕		Orig Pers Area ↕		Orig BU Code ↕	
2350	Dept of Labor & Industries	2350	Dept of Labor & Industries	00MC	IBEW Elec Insp
4050	Department of Transportation	4051	Marine Division	000U	Deck (Unlicnsd)
4050	Department of Transportation	4050	Dept of Transportation	00SR	Engnring Techs
3100	Department of Corrections	3121	McNeil Island Corr Ctr	00TA	Institutions
Report Results Before Orig Pers Area drilldown is removed					

Orig Agency Code ↕		Orig BU Code ↕		Article Name1 ↕
2350	Dept of Labor & Industries	2350/00MC	IBEW Elec Insp	Discipline
4050	Department of Transportation	4051/000U	Deck (Unlicnsd)	Non-Discrimination
4050	Department of Transportation	4050/00SR	Engnring Techs	Hours of Work
3100	Department of Corrections	3121/00TA	Institutions	Overtime
Report Results After Orig Pers Area Drilldown is removed				



If necessary, click any column header and select Back to Start from the Context Menu to return the report results to the original state. See the BI Self-Paced Learning Materials - Report Context Menu for more information on Back to Start.

# Drilldown in the Rows/Columns

BI Grievance reports were designed to provide the user with flexible reporting options. The Drilldown option of the report results allow the user to add Characteristics to the report results.

The example below uses the Grievance Details Report to show how to use Drilldown in the Rows.

To drilldown in the Rows of the report results:

1. From the report results, click a characteristic in the Navigation block.
2. From the Context Menu, select “Change Drilldown” → “Drilldown By” → “Vertical”

The screenshot displays the 'Grievance Details Report' interface. On the right, a 'Navigation Block' lists characteristics under 'Columns' and 'Rows'. The 'Rows' list includes: Contract YR1, Master Agreement1, Orig Agency Code, Orig BU Code, Article Name1, Article #1, Sub-Article Name1, Sub-Art #1, Subtype, Employee Name, Grievance Status, Step, Grievance #, and Date Filed. A callout box points to this list with the text 'Location of the Navigation Block'.

Below the report, a context menu is open over a data row. The menu path shown is: 'Change Drilldown' → 'Drill Down By' → 'Vertical'. The 'Vertical' option is highlighted. Other options in the 'Drill Down By' submenu include 'Horizontal', 'Swap Orig Pers Area with', 'Remove Drilldown', and 'Swap Axes'.

Continued...

# Drilldown in the Rows/Columns, Cont...

Result: The Orig Pers Area Characteristic is added to the rows of the report results.

Orig Agency Code		Orig BU Code	
2350	Dept of Labor & Industries	2350/00MC	IBEW Elec Insp
4050	Department of Transportation	4051/000U	Deck (Unlicnsd)
4050	Department of Transportation	4050/00SR	Engnring Techs
3100	Department of Corrections	3121/00TA	Institutions
4610	Department of Ecology	4610/00J2	Agencywide
3000	Dept of Social & Health Serv.	3021/00JE	Econ/SocialSvcs
		3000/00JE	Econ/SocialSvcs
		3025/00JE	Econ/SocialSvcs

Report Results Before Drilldown in Rows for Orig Pers Area

Orig Agency Code		Orig Pers Area		Orig BU Code	
2350	Dept of Labor & Industries	2350	Dept of Labor & Industries	00MC	IBEW Elec Insp
4050	Department of Transportation	4051	Marine Division	000U	Deck (Unlicnsd)
4050	Department of Transportation	4050	Dept of Transportation	00SR	Engnring Techs
3100	Department of Corrections	3121	McNeil Island Corr Ctr	00TA	Institutions
4610	Department of Ecology	4610	Dept of Ecology	00J2	Agencywide
3000	Dept of Social & Health Serv.	3000	DSHS Headquarters	00JE	Econ/SocialSvcs
		3021	DSHS Region 1	00JE	Econ/SocialSvcs
				00JG	Econ/SocSvcsSup

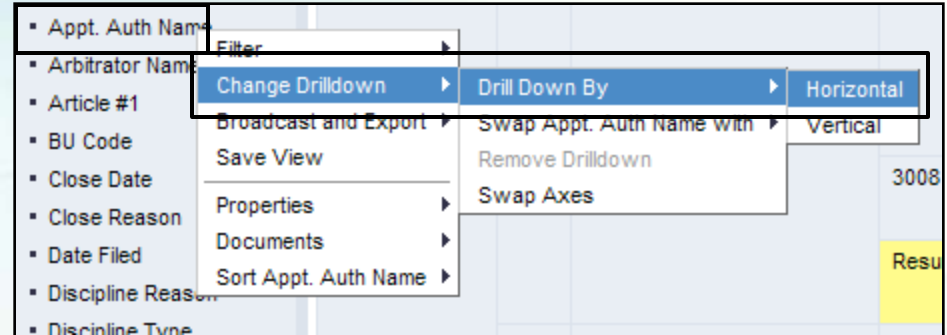
Report Results After Drilldown in Rows for Orig Pers Area

Continued...

# Drilldown in the Rows/Columns, Cont...

The example below uses the Grievance Details Report to show how to use Drilldown in the Columns. To drilldown in the Columns of the report results:

1. From the report results, right click the Characteristic to be added to the report results.
2. Click the “Change Drilldown” → ”Drill Down By” → “Horizontal” for Appt. Auth Name to add the Characteristic to the Columns of the report results.



Master Agreement1	Coalition					IBU		IFPTE L17		
Appt. Auth Name										
	455	457	756	261	456	1073	268	427	416	822

Result: The Appt. Auth Name Characteristic has been added to the columns of the report results.

**i** If necessary, click any column header and select Back to Start from the Context Menu to return the report results to the original state. See the BI Self-Paced Learning Materials - Report Context Menu for more information on Back to Start.

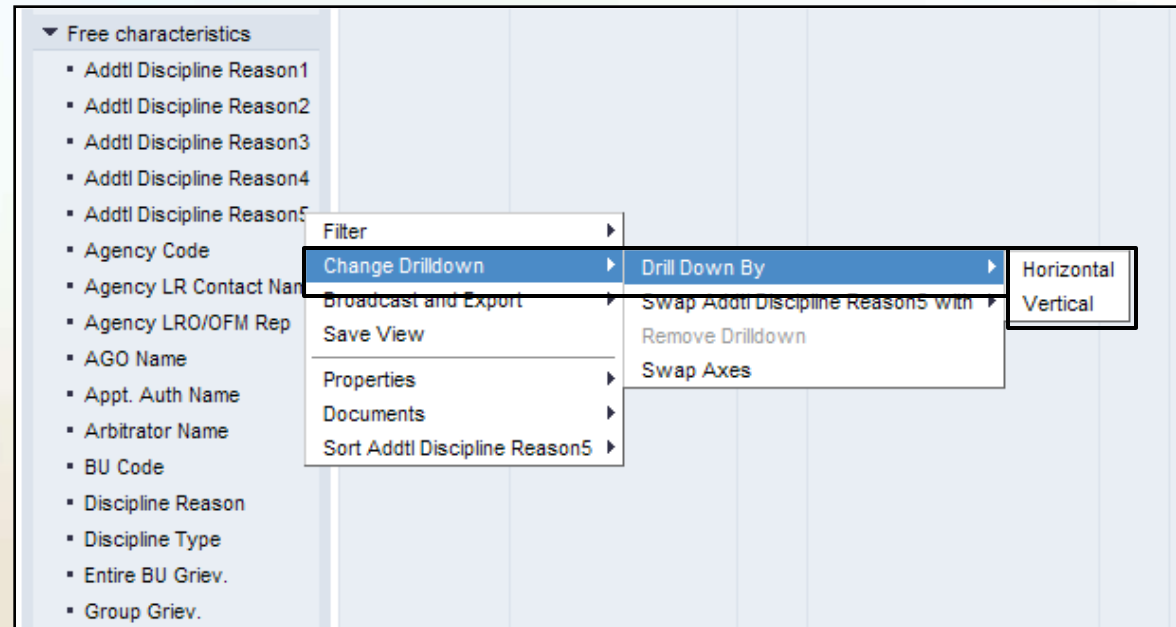


BI Grievance reports were designed to provide the user with flexible reporting options. Free Characteristics are optional Characteristics that are not displayed in the report results when it is initially run. Users have the option of adding Free Characteristics to the report results at run time.

The example below uses the Grievance Details Report to show how to add Free Characteristics to the report results.

To add a Free Characteristic to report results:

1. From the report results, right click the characteristic in the Free Characteristics that you want to add to the results.
2. Select “Change Drilldown” → “Drill Down By” → “Vertical” to add the characteristics to the Rows
3. Select “Change Drilldown” → “Drill Down By” → “Horizontal” to add the characteristic to the Columns.



Continued...

# Drilldown in the Rows/Columns, Cont...

Result: The AFRS Task Characteristic is added to the rows of the report results.

Master Agreement1	Orig Agency Code	Orig BU Code	Orig Agency Code	Orig Pers Area	Orig BU Code
Coalition	4770 Department of Fish & Wildlife	4770/00MN WAPB Bio BU2	4770 Department of Fish & Wildlife	4770 Dept of Fish & Wildlife	00MN WAPB Bio BU2
	2350 Dept of Labor & Industries	2350/00MC IBEW Elec Insp	2350 Dept of Labor & Industries	2350 Dept of Labor & Industries	00MC IBEW Elec Insp
	3000 Dept of Social & Health Serv.	3000/00JE Econ/Social Svcs	3000 Dept of Social & Health Serv.	3000 DSHS Headquarters	00JE Econ/Social Svcs
		3007/00JK Physicians		3007 Eastern State Hospital	00JK Physicians
		3008/00JK Physicians		3008 Western State Hospital	00JK Physicians
IBU	4050 Department of Transportation	4050/000U Deck (Unlicnsd)	4050 Department of Transportation	4051 Marine Division	000U Deck (Unlicnsd)

Report Results Before Drilldown in Rows for Orig PersArea

Report Results After Drilldown in Rows for Orig PersArea

Continued...

BI Grievance reports were designed to provide the user with flexible reporting options. The Keep Filter Value context menu item allows the user to view report results for a specific value. For example, the user may want to view report results for a specific Master Agreement only.

The example below uses the Grievance Details Report to show how to use the Keep Filter Value option to filter report results to include only those records where the Master Agreement is “Coalition”.

To use Keep Filter Value:

1. From the report results, click the “Coalition” value in the Master Agreement column to open the Context Menu.
2. Select Keep Filter Value.

Master Agreement1	Orig Agency Code	Orig Pers Area
Coalition	4770 Department of Fish & Wildlife	4770 Dept of
<div> <div>Back</div> <div>Filter</div> <div>Change Drilldown</div> <div>Broadcast and Export</div> <div>Save View</div> <div>Properties</div> <div>Documents</div> <div>Sort Master Agreement1</div> </div> <div> <div>Keep Filter Value</div> <div>Keep Filter Value on Axis</div> <div>Filter and Drill Down By</div> <div>Select Filter Value</div> <div>Remove Filter Value</div> <div>Variable Screen</div> </div>		
	ocial & Health Serv.	3000 DSHS H
		3007 Eastern
		3008 Wester
		4051 Marine

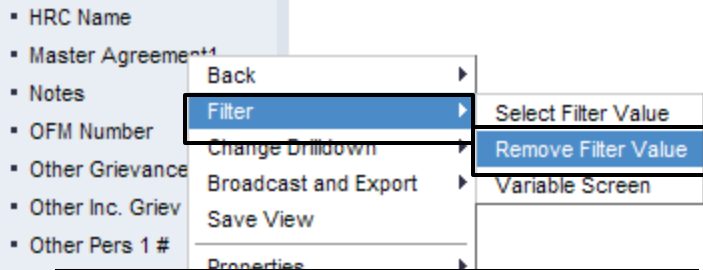
Data displayed for Filter Value Selected only

Contract YR1	Orig Agency Code	Orig Pers Area	Orig BU Code
07-09	4770 Department of Fish & Wildlife	4770 Dept of Fish & Wildlife	00MN WAPB Bio BU2
	2350 Dept of Labor & Industries	2350 Dept of Labor & Industries	00MC IBEW Elec Insp
	3000 Dept of Social & Health Serv.	3000 DSHS Headquarters	00JE Econ/SocialSvcs
		3007 Eastern State Hospital	00JK Physicians
		3008 Western State Hospital	00JK Physicians

Continued...

The Keep Filter Value option can also be set through the Navigation Block. The example below uses the Grievance Details Report to show how to use the Select Filter Value from the Navigation Block.

To remove the “Filter Value”:

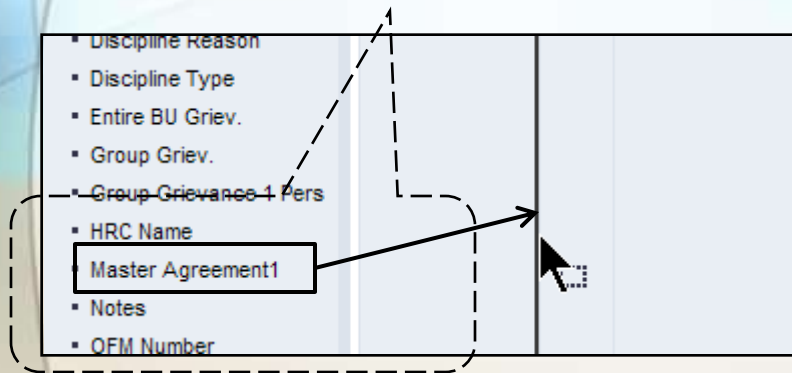


Right click Master Agreement and select “Filter” → “Remove Filter Value”.

Report shows values for all Master Agreement data, but the Master Agreement column is not in the report results.

Contract YR1	Orig Agency Code	Orig Pers Area
07-09	1900 Board of Industry Ins Appeals	1900 BD of Industrial Appeals
	1030 Community, Trade, & Economic Dev	1030 Dept Comm/Trade/Econ Dev

- To return the Master Agreement column to the report results, Drag&Drop the Master Agreement characteristic from the Free Characteristic section to the location you want it to show in your report.



Contract YR1 ⇅	Master Agreement1 ⇅	Orig Agency Code ⇅	Orig Pers Area ⇅
07-09	Coalition	4770 Department of Fish & Wildlife	4770 Dept of Fish & Wildlife
		2350 Dept of Labor & Industries	2350 Dept of Labor & Industries
		3000 Dept of Social & Health Serv.	3000 DSHS Headquarters
			3007 Eastern State Hospital
			3008 Western State Hospital
	IBU	4050 Department of Transportation	4051 Marine Division



# Select Filter Value

BI Grievance reports were designed to provide the user with flexible reporting options. The Select Filter Value context menu item allows the user to select a filter value from a list of filter options.

The example below uses the Grievance Details Report to show how to use Select Filter Value to filter on a specific Master Agreement.

To use Select Filter Value:

1. From the report results, click the Master Agreement column header.
2. Click Select Filter Value from the Context Menu.
3. From the Select Value screen, check Teamsters.
4. Click Add and OK.

Result: Report results for Master Agreement Teamsters only are displayed.

The image contains two screenshots illustrating the process of selecting a filter value.

The top screenshot shows a report table with columns: Contract YR1, Master Agreement1, Orig Agency Code, and Orig Pers Area. The 'Master Agreement1' column header is right-clicked, opening a context menu. The 'Select Filter Value' option is highlighted.

The bottom screenshot shows the 'Select values for Master Agreement1 (ZM5TAGR01)' dialog box. It has a list of Master Agreements on the left, including Coalition, ISU, FPTE L17, MEBA Licensed, MEBA Unlicensed, MN&P, Metal Trades, OPEU, SEIU 1199, Teamsters (which is selected and highlighted in yellow), and UFCW. On the right, there is a 'Selections' pane with columns 'Type' and 'Description'. The 'Teamsters' entry is added to this pane. At the bottom of the dialog, there is an 'Add' button and an 'OK' button.

The bottom screenshot also shows the resulting report table where the 'Master Agreement1' column now displays 'Teamsters' for the selected row.

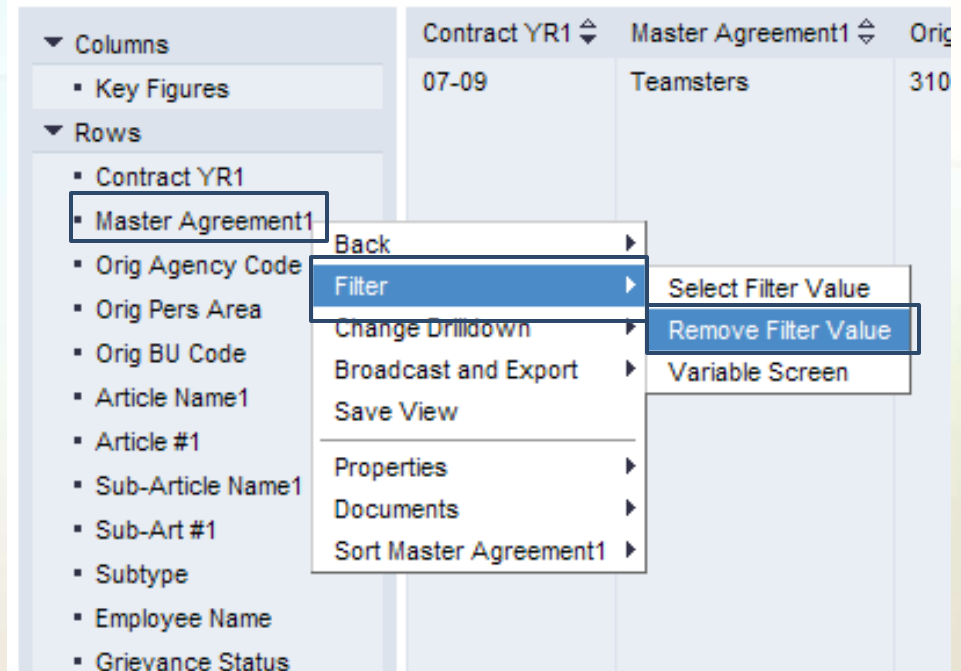
Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area
07-09	Teamsters	3100 Department of Corrections	3113 Airway Heights Corr Ctr

Continued...

The Select Filter Value option can also be set through the Navigation Block. The example below uses the Grievance Details Report to show how to use the Select Filter Value from the Navigation Block.

To set or remove a filter from the report results:

1. From the report results, click the characteristic that you want to remove the filter from.
2. Select “Filter” → “Remove Filter Value”.



Continued...

Contract YR1 ⇅	Master Agreement1 ⇅	Orig Agency Code ⇅		Orig Pers Area ⇅		Orig BU Code ⇅		Article Name1 ⇅	Article #1 ⇅
07-09	Coalition	4770	Department of Fish & Wildlife	4770	Dept of Fish & Wildlife	00MN	WAPB Bio BU2	Compensation	41
								Discipline	30
								Duty Stations	25
								Personnel Files	32
		2350	Dept of Labor & Industries	2350	Dept of Labor & Industries	00MC	IBEW Elec Insp	Discipline	30
								Vacation Leave	12
		3000	Dept of Social & Health Serv.	3000	DSHS Headquarters	00JE	Econ/Social Svcs	Discipline	27
				3007	Eastern State Hospital	00JK	Physicians	Hours of Work	07
				3008	Western State Hospital	00JK	Physicians	Classification	01
	IBU	4050	Department of Transportation	4051	Marine Division	000U	Deck (Unlicnsd)	Agency Personnel Policies	03
									A
								Bid System	AF
								Compensation	18
								Crew Requirements	07

Result: Report results for all Master Agreements are displayed.

Continued...

The Select Filter Value option can also be used to add or remove Key Figures from the report results.

The example below uses the Grievance Master Agreement report to show how to use the Select Filter Value option to remove selected Key Figures from the report results.

To remove a Key Figure:


1. From the report results, click on any Key Figure heading
2. Click the “Filter” → “Select Filter Value”
3. Select the Key Figures that you DO NOT what displayed in your results and click Remove and OK.

The screenshot shows the 'Select Filter Value' dialog box. The 'All' section contains a list of key figures: 'Key Figures Text', 'Number of Primary Ar', and 'Number of Primary Su'. The 'Selections' section shows a table with columns 'Type' and 'Description'. The 'Number of Primary Su' row is highlighted in yellow. Below the 'Selections' table are 'Add' and 'Remove' buttons. At the bottom are 'OK' and 'Cancel' buttons.

Continued...

Master Agreement1	Coalition	IBU	IFPTE L17	MEBA Licensed	MEBA Unlicensed	Metal Trades	MM&P	OPEIU	SEIU 1199	Teamsters	UFCW	WFSE	WPEA	WSPTA
Number of Primary Ar												1		
Number of Primary Ar												1		
Number of Primary Ar												1		
Number of Primary Ar												1		
Number of Primary Ar												1		
Number of Primary Ar												1		
Number of Primary Ar												1		
Number of Primary Ar												1		

Result: Selected Key Figures only are displayed in the report results.

 If necessary, click any column header and select Back to Start from the Context Menu to return the report results to the original state. See the BI Self-Paced Learning Materials - Report Context Menu for more information on Back to Start.



BI Grievance reports were designed to provide the user with flexible reporting options. BI Grievance Reports allow the user to Sort data using the Context Menu.

The example below uses the Grievance Details Report to show how to sort the Orig Agency Code by Key rather than Text.

To Sort the report results by Orig Agency Code:

1. In the report results, click on any item in the Orig Agency Code results to open the Context Menu.
2. Select Sort Orig Agency Code → Ascending by Key (Internal).

Results are sorted by the Orig Agency Code Key in Ascending order

Orig Agency Code	Orig Pers Area	Orig BU Code
4770	Department of Fish & Wildlife	00MN WAPB Bio BU2
2350	Dept of Labor & Industries	00MC IBEW Elec Insp
3000	Dept of Social & Health Serv.	00JE Econ/Social Svcs
3007	Eastern State Hospital	00JK Physicians
3008	Western State Hospital	00JK Physicians
4050	Department of Transportation	000U Deck (Unlicnsd)
4051	Marine Division	

Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area	Orig BU Code
07-09	Coalition	2350	Dept of Labor & Industries	00MC
		3000	Dept of Social & Health Serv.	00JE
		3007	Eastern State Hospital	00JK
		3008	Western State Hospital	00JK
		4770	Department of Fish & Wildlife	00MN
		4770	Dept of Fish & Wildlife	00MN

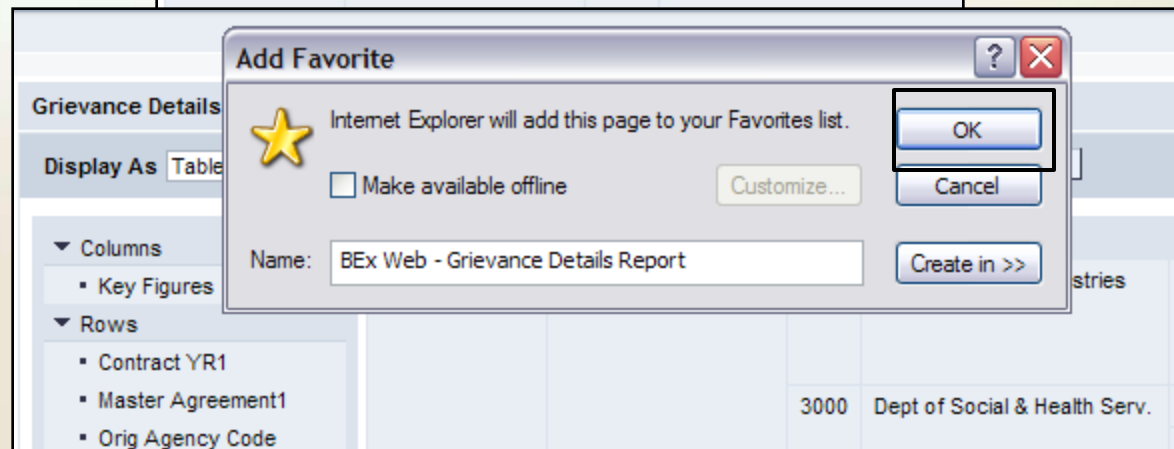
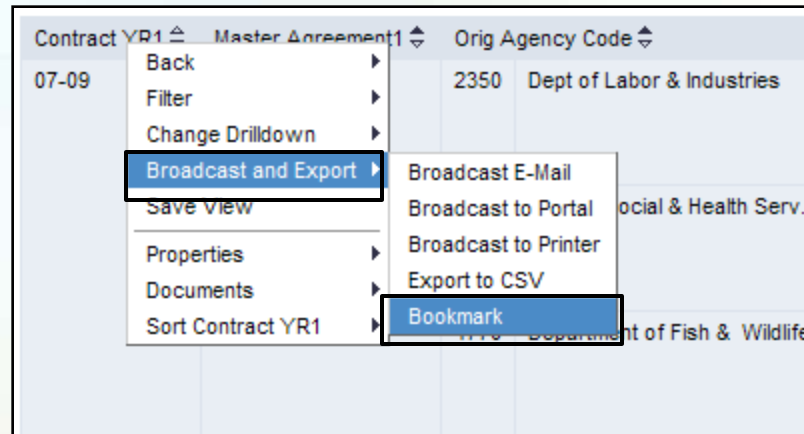
Continued...

The Bookmark context menu item allows the user to save their user-defined report result settings once they have added/removed rows or columns, applied filters, sorted columns or defined any other settings. Bookmarked report results retain the variable values used to run the report.

In the example below, the Grievance Details Report was run with user-defined settings.

To create a Bookmark to save report result settings for future use:

1. From the report results, click on any item in the table to open the Context Menu.
2. Select “Broadcast and Export” → “Bookmark”.
3. A Bookmark link is established and the “Add Favorites” box is displayed. Click OK.



Continued...

To run the User-Defined Who Charged Report - Summary bookmarked report:

1. Select the Bookmarked report from the Favorites folder.

**Grievance Details Report**

Display As: Table Information Send Print Version Export to Excel Comments

Columns	Contract YR1	Master Agreement1	Orig Agency Code	Orig Pers Area
Key Figures	07-09	Coalition	2350	Dept of Labor & Industries
Rows			3000	Dept of Social & Health Serv.
Contract YR1			3007	Eastern State Hospital
Master Agreement1			3008	Western State Hospital
Orig Agency Code				
Orig Pers Area				

**Favorites** Tools Help

Add to Favorites...  
Organize Favorites...

Links

- Access Washington
- BEx Web - RK\_Dist\_Payroll\_Related\_LJN
- BID NetWeaver Portal
- BIP Netweaver Portal
- BIQ NetWeaver Portal
- BP0 Enterprise Portal 6.0 non-sso
- BW-BI Expert Online
- Citrix
- DEV - SAP Enterprise Portal 6.0
- BEx Web - Grievance Details Report**

**Result:** The User-Defined Bookmarked report results are run in the Web Browser with the user's defined settings.

To change the variables of your Bookmarked report, select the "Filter" option from the far right in the report. Select the "Variable Screen" and enter your new variables and click OK.

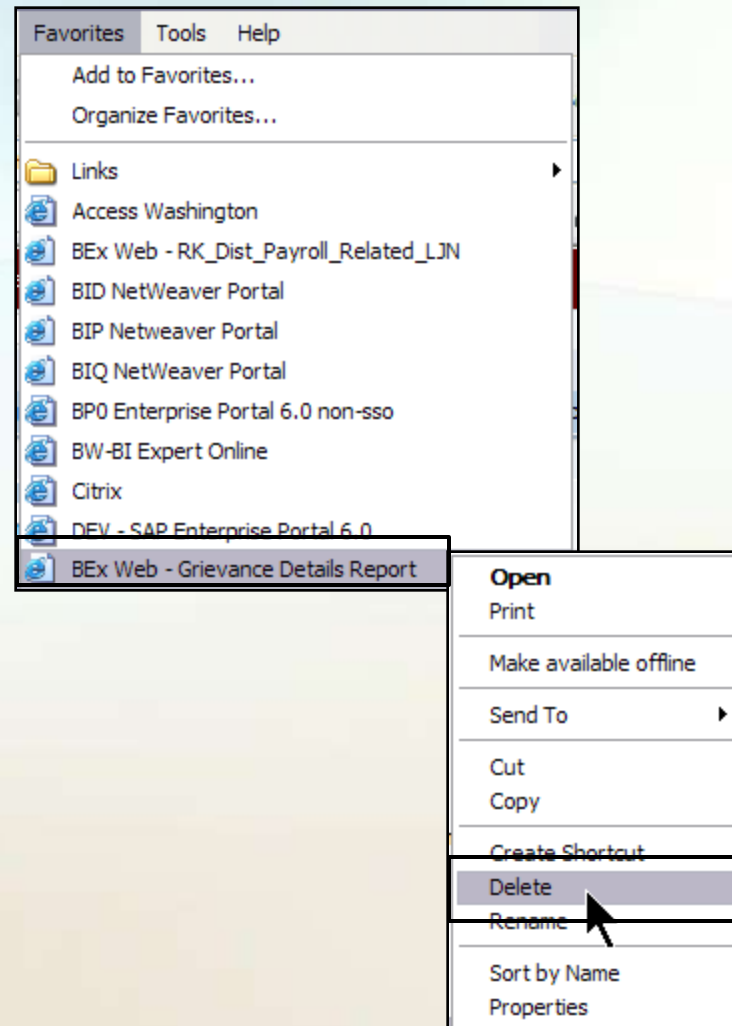
to	Date Filed	Close Date	Close Reason
1/9999	02/25/2008	#	Not assigned
1/9999	04/29/2008	#	Not assigned

OFM Number:	<span>Show All Values</span>	Orig Agency Code
Orig Pers Area:	<span>Show All Values</span>	Other Grievance
Other Pers 1 #:	<span>Show All Values</span>	Pers Area Code:
Shop Steward Name:	<span>Show All Values</span>	Staff Rep Name:
Sub-Art #1:	<span>Show All Values</span>	Sub-Article Name:
Time Ext:	<span>Show All Values</span>	Union Atty Name:
Valid Record for Rep:	<span>Y</span>	Valid to:
<span>Close</span>	<span>Variable Screen</span>	<span>Display All Filter Values</span>

To remove the User-Defined Grievance Details Report from the Favorites folder:

1. From the Web Browser's Favorites list, select the Bookmarked report.
2. Right mouse-click the Bookmark to be removed.
3. Select Delete.

Result: The User-Defined Bookmarked Grievance Details Report has been removed.

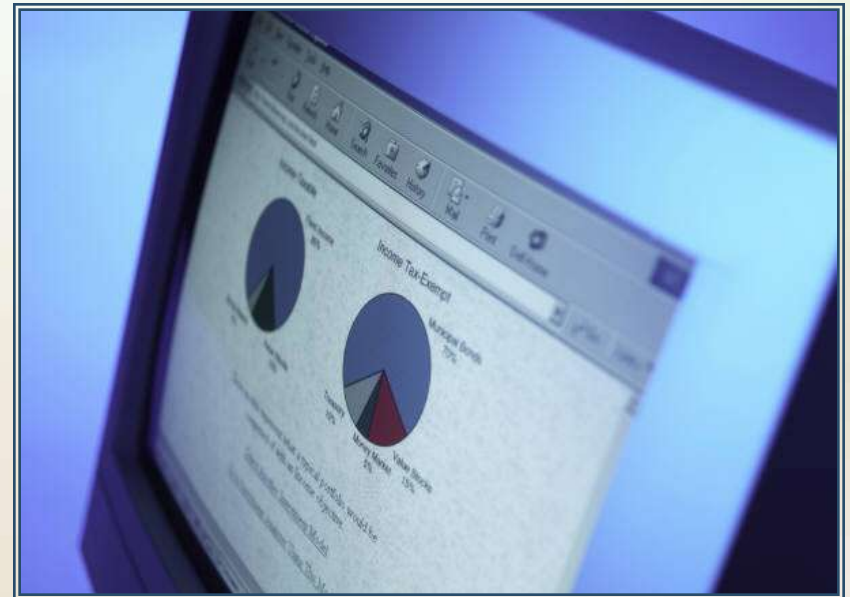


# Using the Goto Command

The Using the Goto Command section provides an overview of the Goto command functionality.

Topics covered in this section include:

- Using the Goto Command





# Using the Goto Command

BI Grievance reports were designed to provide the user with flexible reporting options. BI Grievance Reports **do not** contain sub reports that are accessible from the main report results. The Goto Command allows the user to access sub reports from the context menu.

The table below contains a list of BI Grievance Reports that provide Goto sub reports.

Report Name	Goto Report
N/A - Grievance reports DO NOT have sub-reports available.	N/A

Continued...